iTRAK - Change Management
An Agency Adapting to Change

B&O Committee May 2015

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The iTRAK Change Management Strategy framework considers three overarching objectives, supported by nine key activity areas

Objective	Activity Area	Summary of Actions and Benefits
1. Lead and Build Buy-In	**Change Strategy**	• Define vision and drivers for change and develop strategy for change • Establish clear need for change and direction for implementing change
	Change Leadership	• Support leadership early and throughout the project in managing change • Maintain consistent leadership advocacy and celebrate successes
	Stakeholder Engagement	• Engage stakeholders early and throughout the project • Develop a feeling of being invested in the new system and process
	Communications	• Deliver the right messages at the right time through the right channels • Build buy-in to change and understanding of new roles and responsibilities
2. Understand Impact and Build Capability	**Business Process**	• Assess how iTRAK will affect business processes • Enable adaptation of processes and development of process training
	Workforce	• Assess how iTRAK will affect workforce roles and responsibilities • Enable adaptation of organization/workforce and development of training
	Training	• Train workforce in new system, business processes, and roles • Enable workforce to successfully operate once iTRAK is deployed
3. Measure and Manage	**Performance Management**	• Measure change progress and evaluate change management performance • Enable continual improvement of change management approaches
	Project Management	• Integrate change management activities into the overarching iTRAK project • Enable effective management of change management efforts

Call To Action!

- Developed activities to addressed key changes from iTRAK that affect staff *roles*, *workload*, and required *skillsets*, as well as new *policies*

- Analyzed organizational impacts from two organizational perspectives:
  - Heavy users of iTRAK for multiple core financial functions – daily processing of financial transactions
  - Infrequent users who perform financial functions such as entering requisitions, incoming IAAs, receipts, etc.

- Implemented Change Management, Communication, and Training Activities:
  - **Pre-Deployment**: Preparation before iTRAK goes live
  - **Post-Deployment:** Activities to focus on initial operational capability, supporting users through the change, and adjust organizationally for long term efficiency

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Change Management, Communication, and Training Activities

- **Pre-Deployment** – *Prepare users for transition, analyze organizational impacts, and anticipate issues*
  - Provided **targeted messages** to users through various communication medias
  - Established **Change Champions** and **Subject Matter Experts**
  - Define new **policies**, guidelines, **processes**, and protocols that enable the change to iTRAK
  - Developed and implemented **iTRAK training** (Over 500 users trained in over 100 class room sessions)
  - Conducted **Town Halls** that demonstrated system capabilities and changes to business processes
  - Identified and **managed risks**
  - Conducted multiple **surveys** and used the results to help shape outreach efforts

- **Post-Deployment** – *Adjusting change management activities to focus on helping users through the change*
  - Provided **more detailed information** to users through specific communication medias
  - Established iTRAK **Super User** groups
  - Implemented **advance training** and transaction focused **coaching sessions**
  - Conducted **Town Halls** on specific system functionality and access to financial data
  - Conducted post-deployment **survey**
  - Established **Policy Council**; assessing policies and guidance to determine impact

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Lessons Learned and Challenges

- Used lessons learned from other Federal Agencies and survey responses to help form change management activities throughout the project lifecycle:
  - Strong Executive Sponsorship
  - Robust change management and communications using multiple media tools
  - Standardize processes as much as possible
  - Rigorous system training
  - Users have a voice throughout the project

- Challenges
  - Transitioning from a custom system built to fit the users needs to a Commercial-Off-The-Shelf (COTS) system with standard business processes used to gain efficiencies
  - Mature Financial Reporting Model
  - Revise financial policy to align with new business processes
  - Standardized processes within NSF

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What we need from the B&O

- Provide feedback on change activities that were deployed and how to increase effectiveness of the methods being used to hold the users accountable.

- How should the Change Management Team demonstrate that these changes should be part of the NSF culture and are necessary to better support the NSF mission?

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